SCOTTS INTERNATIONAL

Non-Woven Fabric Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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Report description:

The non-woven fabric market is expected to register a CAGR of less than 7% during the forecast period.

The impact of the COVID-19 pandemic was minimal on the growth of the non-woven fabric market. As governments provided economic packages for SMEs and other benefits, consumers worldwide are now focussing on essential commodities and personal protective equipment.

Key Highlights
Over the short term, the growing application base in the healthcare and personal care industry, along with increasing demand for electric vehicles, is expected to drive the market studied.
However, the low durability and strength of the fabric could potentially hamper demand for non-woven fabric in the market.
On the flip side, increasing construction activities in the US and other emerging economies across the Asia-Pacific region could likely provide future opportunities to the non-woven fabric market.
Asia-Pacific dominated the market across the world, where the demand for non-woven fabric is majorly driven by the increasing application and demand from industries like construction, healthcare, etc.

Non-woven Fabric Market Trends

Increasing Demand from the Healthcare Industry

Non-woven fabric is used to make various products in the healthcare industry, such as surgical gowns, aprons, drapes, face mask components, and wound dressings. They are also used in hygiene products, such as sanitary towels, sanitary napkins, tampons, baby diapers, and napkin liners.

Owing to the COVID-19 outbreak, there has been a huge increase in the demand for non-woven face masks to prevent the spreading of the virus. This has resulted in an increase in demand for non-woven fabrics across the world at an exponential rate.

Asia-Pacific is expected to witness a significant increase in the use of hygiene products over the forecast period due to the increasing adoption of female hygiene products in countries like India and China.

In India, it is currently estimated that over ~60% of Indian women do not use sanitary care products. This is majorly due to the high amount of population residing in rural areas. With the increase in the penetration rate of sanitary care products, owing to the increasing hygiene precautions, the market for non-wovens in the country is expected to grow rapidly.

According to Statista, in India, the sales of sanitary napkins reached 10.31 billion pieces in 2021, growing by over 100% during the last five years. Similarly, in China, the market for feminine products and baby diapers has been growing at a rapid rate due to increasing hygiene-related concerns.

According to SDMA, in the United Kingdom, the total cost of wound management is estimated to be around EUR 8.3 billion (USD 9.7 billion). Around 67% of it is spent on managing unhealed wounds, potentially driving the demand for non-woven fabric in the market. The NHS manages around 7% of the world's adult population, which is equivalent to 3.8 million patients, every year.

An increased spending by major economies on the healthcare facilities is also anticipated to further drive growth for the healthcare industry, thereby strengthening demand for non-woven fabric market during the forecast period. For instance, according to OECD, the United States witnessed its healthcare expenditure and financing grow by 25% in the last five years, amounting to USD 4.08 trillion in 2021.

Other factors like population growth, increasing aging population, and the COVID-19 outbreak across the world are driving the demand for non-woven fabrics in the healthcare industry.

Asia-Pacific is Expected to Dominate the Market

Asia-Pacific is expected to be the largest consumer globally, owing to the commissioning of additional capacities and an increase in the production of non-woven fabric in the region. In terms of consumption and production of non-woven fabric, China held the largest share globally.

The textile industry in China is booming, with increasing investments and government support from the 13th Five Year Plan. Textile and apparel makers in the country are going through painful industrial restructuring. For instance, textile production reached 3.18 billion meters of clothing fabric in October 2022, according to Statista.

The Chinese government is planning Xinjiang as the hotbed for textile and apparel manufacturing, and it has invested USD 8 billion. China's northwest region is expected to become the country's largest textile production base over the next eight years.

On the other hand, healthcare has become one of India's largest sectors. The country's healthcare spending as a percentage of GDP is growing rapidly, owing to the government's focus on improving healthcare. In the Union Budget announced for 2022-23, INR 86,200.65 crores (USD 11.28 billion) was allocated to the Ministry of Health and Family Welfare (MoHFW).

All the aforementioned factors, in turn, are projected to drive the market at high rates in the Asia-Pacific region, owing to the rapid growth of end-user industries.

Non-woven Fabric Market Competitor Analysis

The non-woven fabric market is fragmented, comprising several large and small players. The top six players accounted for over 22% of the global market. Major players in the market (not in any particular order) include Berry Global Inc., Freudenberg Group, Ahlstrom-Munksjo, KCWW, and DuPont, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
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7.1 Increasing Construction Activities in the Asia-Pacific Region and United States

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